Budget Transfer Template Directions

Use this template to request budget transfers to/from indexes that begin with “1”. Copy and paste the Budget Transfer Template into an email manually or by using Outlook Quick Parts. Directions for creating a quick part follow. Please note:

- Indexes are a six-digit shortcut to the Fund, Organization, and Program numbers.
- Accounts refer to a type of transaction.
- Find a full list of Account numbers in the Banner e-Print system.
- Additional examples and best practices are at the end of the document.

Email Budget Transfers to Budget@cofc.edu or search for “Budget Transfer Requests” in the Outlook Address Book.

Budget Transfer Template

From Index and Account:
To Index and Account:
Amount of transfer:
Reason for Transfer:
Permanent or One-time:

Directions for Outlook Quick Parts

1. Open up a new email message and paste the budget transfer template into the body of the email.
2. Select the text area of the budget transfer template and click the Quick Parts icon on the Insert ribbon tab.
3. Select Save selection to the Quick Part Gallery, at the bottom of the flyout.

4. Enter the name for the Quick Part building block. The rest of the items can remain as the defaults.

5. To use the template, open up a new email message. Put the cursor in the body of the email. In the Insert Ribbon tab, click Quick Parts and then the desired template. The template will then appear in the body of the email.
Example

Good morning,

I am requesting the following transfer:

- **From Index and Account:** 123456/71010
- **To Index and Account:** 123456/73010
- **Amount of Transfer:** $500
- **Reason for Transfer:** Fund shortage in travel
- **Permanent or One-time:** One-time

Thank you,

7. Best Practices
   
a. Most common operational account expense numbers.
   
i. 71010 Contractual Services
ii. 72010 Supplies
iii. 73010 Travel
iv. 75010 Contingencies

b. Banner e-print link: [https://eprint.cofc.edu](https://eprint.cofc.edu) or on the Finance Tab in MyCharleston.
c. Notify the Budget Office for other options if the budget transfer request is between Indexes starting with one (1xxxxx) and other Indexes (starting with 2/3/5/6/9).
d. Ensure that the requesting from index and account contains the necessary funds to complete the budget transfer.